PDC Technical Assistance Grant Minimum Standards

While we wish to maintain as much flexibility as possible for Technical Assistance (TA) grants to Planning District Commissions (PDCs) so that projects can be tailored to meet local needs, in order to provide more standardized project results and facilitate reporting to NOAA, it is necessary to apply minimum standards for these grants. The overall mission of the TA grants is to advance coastal management at the local level and PDC efforts to meet this objective should be closely tied to the ten goals of the Virginia Coastal Zone Management Program (CZM). The three (3) minimum standards below are intended to correspond with many of the activities currently undertaken by PDCs. Grant proposals should not be limited to these standards, but should contain products that demonstrate that the standards have been met.

If you have any questions about this overall process, please contact your CZM Project Manager for further explanation *before* planning an event or project that you would like to satisfy a grant requirement. Grant extensions are also possible in most cases in order to ensure that you meet these requirements by the end of the project.

1) **Coordination**: Sharing information on coastal management issues is a key component of the TA efforts of PDCs. This may include sharing information among local governments within the PDC, or between local governments and state or federal agencies. PDCs should, at a minimum, hold quarterly meetings of local government representatives directly involved in the management of coastal resources. While we understand that circumstances (such as the COVID-19 pandemic) may cause you to adjust your meeting schedule, you must still meet a minimum of four (4) times over the course of the grant. The Products submitted to evidence this coordination should focus on the ***outcome*** of such meetings (e.g. position papers or talking points submitted on behalf of localities, or meeting summaries provided to localities etc.). These quarterly meetings may be held either in-person or virtually and should be designed to do several things: provide information <u>to</u> your localities about state/federal initiatives, solicit input <u>from</u> each locality on state/federal initiatives, and allow the exchange of information <u>between</u> localities. Agenda items should be determined by the PDC and these meetings may also serve as the forum used to offer the required trainings as discussed below.

   The effects of coordination are difficult to quantify and to evidence. However, we all need to begin to think along these lines. For example, what benefit came from attending this meeting? What is my role on this committee and how does that benefit my localities or CZM? The deliverables for this aspect of TA should focus on the <u>outcome</u> of attending such meetings or serving on these committees. For example, what materials have you prepared to present at the meeting (e.g. position papers written on behalf of your localities), and what follow-up did you do (e.g. prepared a summary of the impact of the topic for your member localities)? In this example, these position papers and summaries would be your grant deliverable, <u>not</u> the agenda from the meeting. At a minimum, a summary of the meeting should be included in this section of your TA grant final report and the agenda should be included in an appendix to the report. If possible, a list of attendees should be included in either the summary or the annotated agenda, but at a minimum the number of attendees must be included in the final report or annotated agenda.

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2) **Training**: PDCs are in an excellent position to provide regularly scheduled training on coastal resource management issues to local government representatives. At a minimum, PDCs should provide four (4) training opportunities during a grant year. Training should relate to one or more of CZM's *Coastal Resources Management Goals* (**Appendix A**) and could be provided as a portion of the quarterly local government meetings (e.g. a presentation from a particular state agency), or through separate workshops or meetings. Thus, a PDC could have at a minimum four (4) meetings featuring a training topic at each during the course of the grant period. If this is your intention, in order to minimize travel time, cost, or otherwise, please budget accordingly to minimize transferring funds from one task to another. State agency staff, PDC staff, academic, or other experts involved in the selected topic typically give trainings. CZM staff may also provide trainings, although this is less common.

Based on a review by NOAA's Office for Coastal Management (OCM) of annual Performance Measures submitted by CZM for November 1, 2020 to October 30, 2021, we also request that PDCs provide more details on trainings held during the given grant period, both in semi-annual Progress Reports (due April 15 and October 15) and final grant product reports. The reasons for this new change in CZM standards are thus:

- To ensure one (1) annual Performance Measures submittal to NOAA without additional requests to PDCs for more information on an event.
- To help CZM track eligible trainings across Progress Reports before Final Products are due (Performance Measures are typically due by October 30, after October 15 Progress Reports are due, but before Final Products are due November 15)
- To help PDCs track eligible trainings so there are no surprises toward the end of a grant.

Specifically, CZM would like PDCs to differentiate between events by using "training" vs. "meeting" in each Progress Report narrative section (first page – include 2-3 sentences) and Trainings table (second page – include 1 sentence). Please elaborate on events such as an "Environmental Managers meeting" or "Local Land Use Administrators Meeting" by adding a note describing the topic(s) presented and the outcome of the discussions afterwards on the first page of the Progress Report. For example, a presentation by VDOT to a group of local stormwater managers might be reported as "VDOT regional environmental manager (name) gave a 15-min PPT presentation followed by an interactive Q&A session or exercise with the audience on the process of converting end of state-maintained roads into public access areas using the Middle Peninsula Public Access Authority as a model. The meeting gave localities an opportunity to better understand potential state-regional-local partnerships, application processes, and how to leverage resources to support public access goals in the Coastal Zone." On the second page of the Progress Report in the Trainings table, you could put the description as "Process of converting end of state-maintained roads into public access areas."

But apart from the new reporting criteria, what actually constitutes a training? The notes below are excerpted from NOAA OCM's *Training or Not?* guidance document, shared with CZM during the recent program review period:

Training events are provided to coastal decision makers or other coastal stakeholders in order to support and contribute to coastal management outcome(s) or goals.

- They are more than information sharing or updates, and most often involve some planning, identification of a targeted audience, and specific messaging, guidance, or technical advice on a coastal management subject.
- Evidence of a training might take the form of continuing education credits, a certificate, or meeting an education requirement for a program or initiative.

Questions to ask to determine if an event is considered training:
- Is this an event targeted and tailored to a specific audience or group?
- Does the event contribute to one or more coastal management goals or outcomes? If so, how?

More often than not, training events take the form of:
- Workshops
- Seminars
- Field experiences
- Demonstrations
- Conferences (*but not simply attending one and sharing the outcomes with fellow staff or community members*)
- Distance-learning opportunities (e.g., targeted educational webinar)

For more information on CZMA Performance Measures guidance on what constitutes a training event, please see **Appendix B**. This guidance defines what types of events CZM, and thus a PDC, can include as a "training." For examples from CZM staff of events that "count" and "don't count," please see **Appendix C**.

3) **Issue Analysis / Special Projects**: In order to provide a uniform standard for reporting, each PDC should undertake at least one (1) project during the grant year that helps advance one or more of the CZM Coastal Resources Management Goals (**Appendix A**). Projects should involve analysis of a coastal resource management issue that is important to the region or to a particular locality. Projects should also involve coordination with appropriate stakeholders and result in a product (report, map, brochure, etc.) that can be included as a deliverable.

In addition to the day-to-day technical assistance provided by the PDC, the PDCs are in a unique position to identify upcoming issues of regional significance. This minimum standard is included so that each PDC identifies one topic/issue of concern and addresses it through background research, problem identification, analysis and recommendations for future improvement. The topics should relate to the Virginia CZM Program's 10 goals (below). The project or issue identified should reflect both local need and designed in a way to enhance management of the issue moving toward better coastal management in your region.

Appendix A: CZM Coastal Resources Management Goals

Coastal Resource Protection
- <u>Goal 1</u>: To protect and restore coastal resources, habitats, and species of the Commonwealth. These include, but are not limited to, wetlands, subaqueous lands and vegetation, beaches, sand dune systems, barrier islands, underwater or maritime cultural resources, riparian-forested buffers, and endangered or threatened species.
- <u>Goal 2</u>: To restore and maintain the quality of all coastal waters for human and ecosystem health through protection from adverse effects of excess nutrients, toxics, pathogens, and sedimentation.
- <u>Goal 3</u>: To protect air quality.
- <u>Goal 4</u>: To reduce or prevent losses of coastal habitat, life, and property caused by shoreline erosion, storms, relative sea level rise, and other coastal hazards in a manner that balances environmental and economic considerations.

Coastal Resource Sustainable Use
- <u>Goal 5</u>: To provide for sustainable wild fisheries and aquaculture.
- <u>Goal 6</u>: To promote sustainable ecotourism and to increase and improve public access to coastal waters and shorefront lands compatible with resource protection goals.
- <u>Goal 7</u>: To promote renewable energy production and provide for appropriate extraction of energy and mineral resources consistent with proper environmental practices.

Coastal Management Coordination
- <u>Goal 8</u>: To ensure sustainable development on coastal lands and support access for water-dependent development through effective coordination of governmental planning processes.
- <u>Goal 9</u>: To avoid and minimize coastal and ocean resource use conflicts through research, planning, and a forum for coordination and facilitation among local, regional, state and federal government agencies, interest groups, and citizens.
- <u>Goal 10</u>: To promote informed decision-making by maximizing the availability of up-to-date educational information, technical advice, and scientific data including the use of new tools such as marine spatial planning.

Appendix B: CZMA Performance Measures Guidance

This measure also captures training events offered by the CZM Program. The CZM Program provides scientific and technical information and skill-building opportunities to individuals who are responsible for making decisions that affect coastal resources. Using a range of approaches, CMPs provide coastal decision-makers with the knowledge and tools they need to address critical resource management issues. ***Training includes events for audiences that focus on more technical subject matter than those provided through educational activities.*** Training can include activities that are tailored to a specific audience, such as wetland regulators or a local agency permitting program and should be limited to training events offered by or funded by the CMP. Training events that are funded by CZM federal or matching funds, but conducted by partners should be included. Training events can be provided through the Internet to provide remote access; however, if there is not a registration or a sign-up process, ***only report those events for which the number of participants can be documented.***

This measure does not include CMP staff training, but can include training events for staff of network partners or local coastal programs. Do not include publications (e.g. manuals) or other materials that are distributed without an associated and targeted training program.

Participants are the people that participated in the reported educational activity or training event. CMPs should document the number of participants for each event reported at the time it is conducted. If a sign-in sheet or registration is not possible, the program should ensure that the person conducting the event records a count of participants at the time of the event.

Appendix C: VA CZM Staff List of What Topics Count & Don't Count

Listed below are examples of what topics count and do not count as trainings (these are not exhaustive lists):

<u>What Counts</u>:

- Presentation by a guest speaker, PDC staff, or CZM staff on a technical topic as long as the event is not funded separately by CZM grants and the presentation contains information on how to use the tool in your work. Examples:
  - GIS tool (CZM's Coastal GEMS, DCR's Natural Heritage Database, etc.)
  - Planning tool (Community Rating System (CRS), Resilience Adaptation Feasibility Tool (RAFT), etc.)
- Presentation by state agency staff on existing regulations or policies
  - CZM's new Narrative Enforceable Policies. This may assist PDC or local government staff in review of projects for environmental impacts, also a component of most TA grants.
  - Living shoreline regulations for local wetlands board members
  - BMP's for residential septic systems for local planners
- Overview by state agency staff (likely DEQ) on best practices for incorporating environmental justice (EJ) into regional and local planning efforts, including use of GIS tools (EJ Screen) to identify underserved communities
- Guest speakers from Virginia Indian Tribes or Virginia Department of Historic Resources (DHR) on best practices and establishing points of contact for protecting sensitive cultural and historic resources during planning and project implementation processes within the Coastal Zone
- Courses with professionally developed curriculum and formal structure e.g. Chesapeake Bay Landscape Professional program. Individual participation in a course does not count, but requesting a training course for a group of locality staff would count.
- Presentation by VDOT to localities on converting end of state-maintained roads into public access or coordination to construct a public bike or footpath in conjunction with a roadway widening project (Capital Trail)
- Pilot programs and how you can apply them to your work

<u>What Does Not Count</u>

- Giving updates on *draft* regulations, ongoing plan development, or having a forum for discussion of regulations or programs without having a training on how others might use regulations or programs in their work.
  - This would include sharing updates on the Virginia Coastal Resilience Master Plan (VCRMP) by PDC staff. However, if DCR staff asked to give an overview of the process AND walk attendees through the resilience project database, the presentation would be acceptable.
- An update or meeting on issues or projects, or a "round robin" on environmental updates.
- Updates on specific past or ongoing CZM projects. CZM staff are more than happy to provide a final product upon request or attend a meeting to discuss current projects, but the former will

be publically available via the DEQ website soon, and the latter are often featured at quarterly PDC or semi-annual CPT meetings, which localities are welcome to attend.

- Using the TA trainings meeting solely to discuss another CZM deliverable from the same or another grant e.g. a presentation on RAFT which localities are already undergoing and/or does not include how to apply the RAFT to a locality, or review of a Strategic Plan that is a PDC's special project.
- Recapping recent environmental conferences that PDC or locality staff might have attended or meetings for which a recording is available.
- Overviews of coastal programs for which the PDC or locality has a separate relationship with state or Federal programs e.g. TMDL programs (DEQ) or FEMA flood insurance. For example, if DEQ staff give a presentation on Phase III Watershed Implementation Plan (WIP) updates, that would likely be associated with the DEQ annual grant requirement to a locality and would be double counting toward CZM grant requirements.
- Publically available workgroup opportunities where PDC and locality staff are invited or available to participate in e.g. the Virginia ADVWG
- Presentation by state, PDC, locality, or NGO staff on funding opportunities and how to apply (including detailed steps). However, a case *might* be made that a training that delves into reporting requirements, documentation, etc. should be eligible (if planned, please consult your CZM project manager in advance to discuss). Examples include:
  - DCR's Shoreline Erosion Advisory Service (SEAS) program
  - National Fish & Wildlife Foundation (NFWF) grants
  - DCR's Community Flood Preparedness Fund (CFPF) grants